REFUNDS PROCEDURE

PSAH Training and Recruitment Refunds Procedure	
PURPOSE	This process serves as the guide and reference document for the refunds processing of **PSAH Training and Recruitment Pty Ltd.** Changes to this procedure may only be made upon approval of the **Error! Reference source not found.** Management.
ROLE UNDERTAKING TASK	Admin Team
DOCUMENT UPDATE	24 March 2020

STEP 1 – Lodgement of Refund Request		
No.	**Who**	**Actions**
1.1	**Student**	a. Client provides written notification of refund request via letter, email or completion of the Refund Request Form and Withdrawal from Training Form (if applicable).
1.2	**Admissions Officer**	b. If student is withdrawing prior commencement of training, contact the student to determine of other options or pathways are suitable. c. If student is withdrawing from commenced training, confirm with the student if a trainer and assessor has been in contact to discuss with him/her to determine reason for withdrawal and offer other options and pathways. d. If the student has not been contacted, encourage him or her to continue training where possible and provide options or applicable pathways. e. If student still decides to cancel or withdraw training, proceed to processing the request according to the Fee Administration and Refund Policy.

STEP 2 – Processing the Refund Request		
No.	**Who**	**Actions**

2.1	**Admissions Officer**	a. Review the Refund Application Form.
		
		b. Conduct refund eligibility assessment:
		
		    i. Determine when student was enrolled.
		
		    ii. Determine if student applied for refund within the "refund period" as per the Fee Administration and Refund Policy.
		
		    iii. Determine payment method (for approved refunds)

		c. Notify student that refund cannot be processed if the student is not eligible (beyond the "refund period").
		d. In situations where the student wishes to claim for refund and experiencing personal difficulties, or medical condition, provide the student information on how they can seek consideration from Management and required evidence needed.
		e. Calculate refund if student is eligible.
		f. Update the PSAH Training and Recruitment Refund Register.
		g. Request for approval from PSAH Training and Recruitment Management before requesting for refund to be processed (*provide the* PSAH Training and Recruitment *Manager the link to the Refund Register).*
2.2	**Manager**	h. Review the refund request form and other supporting documents (if applicable).
		i. If a refund is due and approved update the Refund Register and provide instruction to admissions officer for processing.
		j. If the refund is not approved update Refund Register and provide reason for decision.
2.3	**Admissions Officer**	k. If refund is due proceed with processing the refund.
		l. If refund request is not approved inform student including the reason for the decision.

STEP 3 – Finalising Refund

No.	Who	Actions
3.1	**Admissions Officer**	a. Obtain student bank details (if applicable).
		b. Process the refund in the Accounting System and SMS – Power Pro .
		c. Update the Refund Register.
		d. Send information to Accounts for processing (if applicable).
		e. File all documentation on student file.
		f. Inform student of the refund status and timeframes.

VERSION CONTROL

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<tr><th colspan="4">Version Control Table</th></tr>
<tr><th>Date</th><th>Summary of Modifications</th><th>Modified By</th><th>Version</th></tr>
<tr><td>01/12/2019</td><td>Document Creation</td><td>360RTO</td><td>v. 1.0</td></tr>
<tr><td>24/03/2020</td><td>Document Updating – Letterhead and Company Information</td><td>360RTO</td><td>v.1.1</td></tr>
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<tr><th colspan="2">RTO INFORMATION</th></tr>
<tr><td>Document Name</td><td>Refund Procedure v.1.2</td></tr>
<tr><td>RTO/Company Name</td><td>PSAH Training and Recruitment</td></tr>
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